



ISANNE Advancement and Communications Conference

"It's All About the Brand... 'bout the Brand"

Church Landing – Meredith, New Hampshire

November 2-3, 2017

Agenda

Wednesday, November 1, 2017

7:30 – 9:00 pm Networking for Early Arrivers at Lakehouse Grille

Thursday, November 2, 2017

Breakfast on your own

8:30 – 9:30 am Registration

9:30 – 9:45 am Welcome by *Laurie Hurd*, ISANNE Executive Director

Introductions by Committee Co-Chairs

Nick LeBel, Director of Marketing and Communications, Bridgton Academy

LeeAnne Smith, Director of Advancement, Stanstead College

9:45 – 10:35 am Session I – Full Group Presentation

"Why Strategic Branding Matters: The Power of Positioning"

Presenters: *Ken Mason*, Director of Strategic Marketing and Communications, The Gunnery School & *John Visgilio*, Principal and Co-Founder, Overabove

Description: What does it mean to "own and deploy your brand?" In order for your school to "own" your brand, first you need to do the work to get to the DNA level of who you are and articulate a competitive positioning that

speaks to the needs of the entire school. That takes lots of thinking and working with all your key stakeholders. Once you have arrived at this differentiation, you now need to bring it to life visually and consistently. And, it needs to come to life internally and externally so it separates you from your peer schools.

In this session, The Gunnery and Overabove will demonstrate how to attack this challenge by letting you peek into the very recent (and on-going) process we've collaborated on together. We'll outline the key steps, the proven methodologies and the insights gained along the way. We'll also show you the ups and downs and challenges we faced and we'll go through real-life examples of schools that have been deployed with success, including establishing creative consistency. You'll walk away with a practical view of how you can successfully own and deploy your brand in the marketplace and with some of your best supporters, your alumni.

10:35 – 10:40 am Move to next session

10:40 – 11:30 am **Session II - Breakout**

“Top 10 Lessons Learned from 30 Years on the Campaign Trail”

Presenter: *Eric Rolfson*, The Rolfson Group

Description: A capital campaign can be transformational for a school, but it also can be a disaster if one ignores process, cuts corners, or fails to appreciate what really engages and motivates donors. In this session Institutional Advancement consultant Eric Rolfson shares the top ten lessons he's learned from over 30 years of campaigning at three institutions of higher education and other not-for-profits that are clients of his consulting Group.

You will learn:

- Why campaigns must be about mission, vision, and branding—and not about raising money!
- Why your Board and other campaign leaders are critical to success;
- How the “science” of fundraising should never be ignored;
- The importance of careful planning and execution; and
- Why schools need to build strategic, long-term relationships with prospective donors.

“The Role of Print in a Digital World”

Presenter: *Scott Allenby*, Director of Communications, Proctor Academy

Description: In this session, we will explore the pendulum that has swung over the past two decades from print publishing, to digital, and back. In a world where we are inundated by digital content, schools must find a way to stand out, be relevant, and effectively communicate their value mission to constituents at all stages of the engagement cycle. This session will provide an open conversation on individual school's experiences, as well as explore larger trends in the industry in order to help you develop a strategy that works for your school and your constituents.

“Looking to Expand Your Donor Base?”

Presenter: *Fred J. Forman*, Forman, Clark, Pockell & Associates, P.A.

Description: Charitable Remainder Trusts make it possible for grantors to support causes dear to them, while keeping in mind the best interest of their heirs.

Would your supporters like:

- To earn extra income?
- Get a significant tax deduction?
- Benefit one or more charities that they care about while maintaining what is left to their heirs?

We think they would! Learn how Charitable Remainder Trusts can benefit your nonprofit organization and help meet your donors’ personal financial goals.

11:30 – 12:30 pm Working Lunch – Presentation begins at 11:45 am

The One-Minute Manager – Revisited

Presenter: *Ross Gibson*, The Richards Group

Description: We’ll hear a lunchtime review of Ken Blanchard’s timeless management classic, *The One Minute Manager*, to get specific on how managers can apply the lessons from this seminal work to their daily management responsibilities including:

- A review on One Minute Goal Setting and how setting clear goals is the basis for everything
- An deeper understanding of One Minute Praising and creating cultures of appreciation
- An introduction and deep dive into One Minute Redirects (formerly ‘Reprimands’)

12:30 – 12:45 pm Break

12:45 – 1:35 pm Session III – Keynote – Full Group Presentation

“Outdoor Sport Institute: A Study in Differentiating yourself in a Crowded Development Marketplace”

Presenter: *Andy Shepard*, President/Chief Executive Officer Outdoor Sport Institute

Description: In Andy’s 40 year career, including 16 years building businesses for LLBean, 25 years on the US Biathlon board and 18 years building a non-profit, he has had plenty of experience in understanding the importance of brands. Through those experiences he’ll try to offer some insights into how to separate yourself from a crowded marketplace.

1:35 – 1:50 pm Q & A with Andy Shepard

1:50 – 2:00 pm Break / Move to Next Session

2:00 – 2:50 pm Session IV - Breakout

“What is Your School Known For? Testing Brand Strength with a Communication Audit”

Presenter: *Robin Schell*, Jackson, Jackson & Wagner

Description: Great communications and marketing is all about identifying your USP

(unique selling proposition): Do you know what your school is known for? Stands for? How well is it understood externally? Internally?

Join Robin Schell, APR, Fellow PRSA, Senior Counsel at Jackson Jackson & Wagner, for an interactive session on the steps involved in designing a communication audit that will shed light on the perceptions (and misperceptions) about your school and help you fine-tune your branding messages.

“The Use of Big Data / CRM and Marketing Automation”

Presenter: *Deven Spear*, Chief Innovation Officer, Overabove

Description: These are tools that some schools are just beginning to use but are being implemented more in other industries. This session will look at this "new" wave of technologies and platforms and how it could be beneficial to the school industry.

2:50 – 3:00 pm **Move to next session**

3:00 – 3:50 pm **Session V - Breakout**

“A Branding Roadmap: 5 Steps to your school’s unique and impactful Brand”

Presenter: *Jim Healey*, Owner and photographer Peapod Design

Description: Who are you? What are your key attributes and how important are they to your print, website, and photography? Who are your competitors? Where is your “brand position” in the market place? Why is this so important to independent schools? You will begin to learn the importance of marketing...specifically branding your school to not only compete in a very busy marketplace, but it will be the glue that holds your school community together.

The \$%*!#@ Fund - Everyone's Favorite Campaign

Presenters: *Bonny Morris*, Director of Annual Giving, Proctor Academy and *Julie Yates*, Director of Development & Alumnae/i, The White Mountain School

Description: Leadership, cash flow, phonathons, budget, appeals, goals, participation...Annual Giving is vital to every school. In this idea exchange session, we will lay out some strategies for mapping growth to reach your goals. Attendees should be bring a successful initiative to share for group collaboration.

4:50 – 4:00 pm **Move to Next Session**

4:00 – 4:15 pm **Fast Paced Directed Debrief of Day’s Sessions**

4:15 – 6:00 pm **Free Time – Exercise, check-in at school, emails, relax before a night of fun!**

6:00 – 7:30 pm **Corporate Partner/Sponsor Reception and Showcase**
No formal sit-down dinner – Heavy Appetizers

7:30 pm **Bonfire and Games**

Friday, November 3, 2017

7:00 – 8:00 am Breakfast

8:00 – 8:45 am Session VI - Full Group Presentation

“Independent School Guide to SEO”

Presenter: *Daren Worcester*, Content and Digital Strategy, Blackbaud
Search Engine Optimization (SEO) is not the same today as it was two years ago, last year, or even last month. In this session, we'll discuss the major factors that influence search results and how schools can build a balanced strategy for success today—and tomorrow.

8:45 – 9:00 am Check-out (The Hotel check-out is at 11:00 am. You can check-out now and leave your bags at the desk or request a later check-out time)

9:00 – 9:50 am Session VII - Full Group Panel Discussion

“Alumni Engagement”

Panelists: *Kyllan Gillmore*, Class of 2008, White Mountain School
 Rake Moreau, Class of 2009, Kents Hill School
 Lori Evans, Class of 2000, Derryfield School

Moderator: *Keith Barrett*, Director of Development, Proctor Academy

Description: Join our guest panelists as they share their insight and experiences and prepare to engage in a session of thoughtful discussion on meaningful engagement of alumni.

9:50 – 10:00 am Break/Move to next session

10:00 – 10:50 am Session VIII - Breakout

“On the Road Again”

Presenter: *Keith Barrett*, Director of Development, Proctor Academy

Description: Without a doubt, the most successful fundraising tool is "facetime" with your donors. Spending time cultivating, soliciting, and stewarding allows for powerful, meaningful, and lasting relationships to develop. Keith will share tips for getting the call, planning your trip, scheduling on the fly, and some great stories. Plan to bring your favorite story to share.

“Using Strategy to Drive Data”

Presenters: *Monique Scharlotte*, Philanthropy Manager, and *Nola Frost*, Business Systems Analyst, NH Charitable Foundation

Description: We live in a world where data is being generated at a mind-boggling rate and data “analytics” are all the rage. So how do you know if you’re gathering the right data? And how do you manage it? Staff from New Hampshire Charitable Foundation will share tips with you on how they determine what data to collect, how they keep their data clean, and they’ll share specific examples of data management best practices that work for them.

“Keeping the Horde Happy”

Presenter: *Nick LeBel*, Director of Marketing and Communications, Bridgton Academy

Description: Working with Coaches, Administration, Development; balancing media and PR responsibilities with collateral requirements...Triage, people!

10:50 – 10:55 am **Break**

10:55 – 11:45 am **Session IX - Endnote – Full Group Presentation**

“It’s About the Love!”

Presenter: *Nancy Clark*, Drive Brand Studio

Let’s talk about why your students, parents and donors choose...and love...your independent school. These are also the reasons why you do what you do every day. We call these your brand pillars. And it’s all about your brand. It is authentic to your school and the pillars are the foundation of how you tell your memorable story. In this fun & interactive session, we’ll uncover your brand pillars and make a plan for how to use them, confidently, in your communications and development strategy.

11:45 – 12:00 pm **Full Group Debrief / Take-aways / Adjourn**